

Application Management

An Application in iSynergy is the virtual equivalent of a traditional physical filing cabinet or shelving system. These filing cabinets are analogous to the filing cabinets within the major divisions in your company. Whether you store your documents in a filing cabinet or electronically in iSynergy, the indexing and search retrieval are conceptually the same

For example, Accounting, Operations, Insurance and Human Resources all have a filing cabinet where they keep documents important to their department. People in the Insurance department do not file their documents in the same cabinet as Human Resource department.



An iSynergy application can be used as a simple archive for documents post processing and is most often the starting point for application implementations. Starting with a back-file conversion project is a good way to develop experience and a comfort level with the new solution, but this approach does not provide the greatest benefits to the business.

Moving the capture processes to the front-end of your business process, instead of the back-end, leverages the benefits of document management and provides the capabilities for true process automation.

By capturing documents and content at the front of a business process at the time of receipt, you eliminate many labor-intensive activities and instantly eliminate risks such as lost documents as you perform the tasks that make up your work process. You enhance information access, process tracking, process flexibility, compliance, quality and overall throughput. This is because documents and content are routed through the process electronically without the need for handling and moving physical files, making copies or being limited to a linear process.

The Application structure in iSynergy is configurable to comply with all the organizational needs of the enterprise, which makes managing Applications in iSynergy straight forward and simple. To realize the full potential of iSynergy's storage and retrieval functionality, careful thought and planning must be given to the development of your Applications.

Note: Please review iDatix sample Best Practices Application Configuration worksheet in Appendix A and/or the iDatix Configuration Guide for further details.

In following sections, we will examine the different elements of an iSynergy Application structure in detail and describe how to construct an effective application.

Index Fields

A fundamental Application element is the Index field, which is used to assign identifying characteristics, or index values, to a Document stored in the iSynergy Repository.



Note: An index value is a data value in the iSynergy repository that helps to identify a Document within iSynergy. Additionally, index fields are data-entry fields used to assign values for indexes and must comply with database standards. To help insure standards are met, Index values are assigned specific attributes known as Index types.

iSynergy relies on indexes to file Documents correctly. These indexes correlate to labels on a file folder. When first creating an iSynergy application, the indexes you choose typically will be the same as the filing procedure in the office.

iDatix Client Support Services recommends the following core index values for an iSynergy Application:

- ID Number
- Name
- Date
- Document Type
- Status

Each of these generic indexes can be translated to an industry, department or application specific term.

Note: It is important when communicating with the potential users of the new iSynergy Application to use the specific term and not the generic term. This provides the user with the context necessary for them to identify with the application and to gain a quick understanding of how it applies to their own personal job function.

User-Assigned Index Fields

The System Administrator defines User-Assigned Index Fields for each Application. These Index fields vary with each unique iSynergy Application.

The screenshot shows the iSYNERGY Search interface. At the top, there is a 'Global Search' bar and a navigation menu with 'Search', 'Workflow', 'Indexing', 'Routing', 'Admin', and 'Tools'. Below the menu, the 'Application' dropdown is set to 'Checks'. A red arrow points to the 'User Defined Index Fields' section, which is highlighted with a red box. This section contains a list of fields: 'Checks', 'Name', 'Date', 'Invoice #', and 'Account #'. To the right of this list are input fields for each field, with 'To:' labels for 'Date' and 'Invoice #'. Buttons for 'DISPLAY FIELDS', 'CLEAR FIELDS', and 'SEARCH' are located above the input fields.

Note: For example, the Checks Application may have a unique Index field, such as Purchase Order, while Human Resources may have a unique Index field for Social Security Number. User-Assigned Index Fields are used primarily to search and retrieve Documents from the iSynergy repository.






System Assigned Index Fields


By design, each iSynergy Application has System-Assigned Index fields. These index fields contain values used by the iSynergy Repository to track events and changes in the status of objects stored in iSynergy.

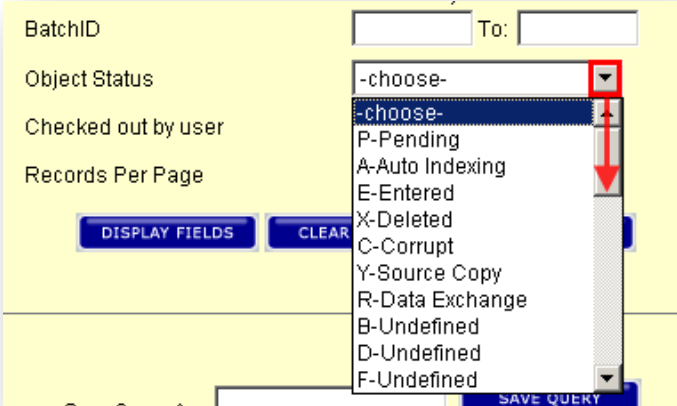
The screenshot shows the iSYNERGY Search interface, similar to the previous one, but with the 'System Assigned Index Fields' section highlighted with a red box. This section contains a list of fields: 'Checks', 'Name', 'Date', 'Invoice #', 'Account #', 'Pages', 'CreatedBy', 'CreateDate', 'ModifiedBy', 'ModifiedDate', 'BatchID', 'Object Status', 'Checked out by user', and 'Records Per Page'. To the right of this list are input fields for each field, with 'To:' labels for 'Date', 'Invoice #', 'ModifiedDate', and 'BatchID'. Buttons for 'DISPLAY FIELDS', 'CLEAR FIELDS', and 'SEARCH' are located above the input fields. The 'Object Status' and 'Checked out by user' fields are dropdown menus, and 'Records Per Page' is a numeric input field.

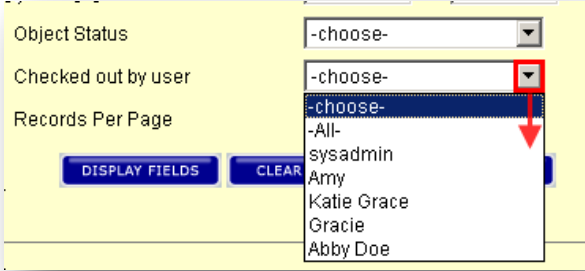
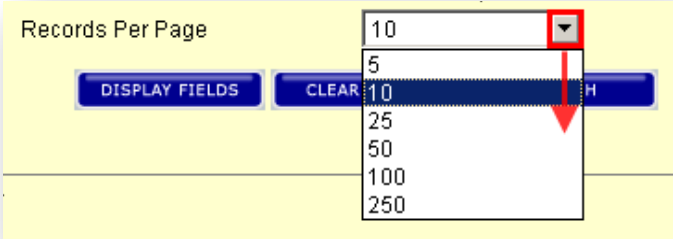
Note: Report generation and various system administration tasks make use of these values.

The following table lists the System Assigned Index Field names and descriptions:

Element	Description
Pages	<p>Provides the ability to search within a range by the number of pages contained in the submitted document.</p> <p>The image shows a search range input for the 'Pages' field. It consists of a yellow rectangular box containing the text 'Pages' on the left, followed by a white text input field, then the text 'To:', followed by another white text input field.</p>
CreatedBy	<p>Provides the ability to search by the name of the user who originally submitted the Document to iSynergy.</p> <p>The image shows a search input for the 'CreatedBy' field. It consists of a yellow rectangular box containing the text 'CreatedBy' on the left, followed by a white text input field.</p>
CreateDate	<p>Provides the ability to search by the date within a range that the Document was originally submitted to iSynergy.</p> <p>The image shows a search range input for the 'CreateDate' field. It consists of a yellow rectangular box containing the text 'CreateDate' on the left, followed by a white text input field, then the text 'To:', followed by another white text input field.</p>
ModifiedBy	<p>Provides the ability to search by the user who made the most recent modification to a submitted Document.</p> <p>The image shows a search input for the 'ModifiedBy' field. It consists of a yellow rectangular box containing the text 'ModifiedBy' on the left, followed by a white text input field.</p>
ModifiedDate	<p>Provides the ability to search within a range by the date the Document was most recently modified.</p> <p>The image shows a search range input for the 'ModifiedDate' field. It consists of a yellow rectangular box containing the text 'ModifiedDate' on the left, followed by a white text input field, then the text 'To:', followed by another white text input field.</p>

Element	Description
BatchID	<p>Provides the ability to search within a user defined range for a document's identification number. When utilizing any of the iDatix capture products, a unique batch ID is created and associated with the Document.</p> <div data-bbox="483 478 1307 531">  </div> <p><i>Note: Each document that is submitted to iSynergy receives a unique batch ID. The object ID in the repository denotes the object, where as the batch ID denotes the Documents that are submitted.</i></p>

Element	Description
Object Status	<p>Provides the ability to choose a search the status of an object within iSynergy from a drop down menu.</p>  <p><i>Hard Coded Object Status Codes</i></p> <ul style="list-style-type: none"> • E: Searchable Documents (Display in the result set for a search in the system). • P: Manual Indexing (Display in the Manual Indexing screen for user intervention). • I: Routed to Inbox (Documents routed to an individuals or groups inbox). • X: Deleted (Documents that have been soft deleted). • C: Corrupt (Documents that have been determined to be corrupt or of incorrect resolution). • Y: Source Copy (Large multi-page TIFF files that have been separated into smaller sections are retained). <p><i>Standardized Object Status Codes</i></p> <ul style="list-style-type: none"> • A: xTractor (Documents to be processed by xTractor Recognition). • R: Data Exchange (Documents to be processed by Data Exchange Service). • V: RapidDoc (Documents to be processed by RapidDoc stations). • M: MultiFunction (Documents to be processed by MultiFunction Service).

Element	Description
Checked Out by User	<p>Provides the ability to search for a document by choosing a user from the drop down menu.</p>  <p><i>Note: The Checked Out by User field is only displayed if at the application level, Revision control settings are selected.</i></p>
Records Per Page	<p>Provides the ability to define the number of displayed records per page.</p> 

Index Field Formats

Index Fields allow you to enter values for a search. There are three types of index field formats:

- Standard.
- Drop Down Menus (UDL's).
- Range (Numbers and Dates).

The screenshot displays the iSYNERGY Search interface. At the top, there is a navigation bar with links for Logout, Datix, Help, and Info. Below this is a search bar with a 'Global Search' button. The main section is titled 'Search' and contains a list of index fields. The 'Application' field is set to 'Invoices'. The 'Invoice Number' field is a range field with 'To:' and 'From:' sub-fields. The 'PO Number' field is also a range field. The 'File Type' field is a standard text input field. The 'Company' field is a standard text input field. The 'Date' field is a range field. The 'Invoice Status' field is a drop-down menu with 'Open' selected. The 'Full Text' field is a standard text input field. The 'Object Status' field is a drop-down menu with '-choose-' selected. The 'Checked out by user' field is a drop-down menu with '-choose-' selected. The 'Records Per Page' field is a drop-down menu with '10' selected. On the right side, there are three labels with arrows pointing to specific fields: 'Range Index Field' points to the 'Invoice Number' field, 'Standard Index Field' points to the 'File Type' field, and 'Drop Down Index Field' points to the 'Invoice Status' field. At the bottom, there are three buttons: 'DISPLAY FIELDS', 'CLEAR FIELDS', and 'SEARCH'.

To use a standard index field, simply type in the appropriate information.

This screenshot shows the iSYNERGY Search interface with the 'Application' field set to 'Invoices'. The 'File Type' field is highlighted with a red arrow and the label 'Standard Index Field'. The 'File Type' field contains the text 'Invoice'. The 'Object Status' field is set to '-choose-' and the 'Checked out by user' field is set to '-choose-'. The 'Records Per Page' field is set to '10'. The 'DISPLAY FIELDS', 'CLEAR FIELDS', and 'SEARCH' buttons are visible at the bottom.

The drop-down menu allows you to choose a single index value. Simply, select the user defined list drop down arrow and choose an index value from list.

The screenshot shows the iSYNERGY Search application interface. The 'Application' dropdown is set to 'Invoices'. The 'Invoice Status' dropdown is open, showing options: Open, Pending, Closed, NULL. A red arrow points to the dropdown arrow icon with the text 'Drop Down Menu'. Other fields include Invoice Number, PO Number, File Type, Company, Date, Object Status, Checked out by user, and Records Per Page. Buttons at the bottom are DISPLAY FIELDS, CLEAR FIELDS, and SEARCH.

Additionally, to select more than one value from a drop-down field:

1. On your keyboard, select the **Ctrl** key and choose the appropriate **Multiple Indexes**. Note that the user can also left click and click drag multiple items in a row.

The close-up shows the 'Invoice Status' dropdown menu. The menu is open, showing options: Open, Pending, Closed, NULL. Red arrows point to the 'Open' and 'Closed' options, indicating they are being selected.

2. Click outside the user defined list. The list will denote that multiple items have been selected.

The close-up shows the 'Invoice Status' dropdown menu after multiple selections. The dropdown is closed, and the text '-multiple-' is displayed in the field.

Type-Ahead UDL Feature

The user defined lists are enhanced to allow users to find values within a list very quickly using the Type-Ahead UDL feature. Users may now begin typing in the drop-down list to limit the number of choices available for selection to efficiently reach the desired choice in a drop-down menu list, even when the list is very long.

For instance, consider the following list:

- Cat – Siamese
- Dog – Bulldog
- Dog – Australian Shepherd
- Dog – German Shepherd
- Fish – Catfish

Users may begin typing the letters “Ca” and the dropdown list will limit the options to “Cat – Siamese” and “Fish – Catfish”. Alternatively, users could type the letters “Dog” and the list would be limited to the three Dog entries. The Advanced user defined list Type-Ahead filtering offers users the ability to select from similar values within a large list very quickly.



In order to select multiple items while narrowing the list to a particular subset:

1. Begin typing the word that you would like to find. In this instance, begin typing “Dog” (See above)
2. Select multiple items by selecting each item individually in the list while holding down the control key. Note that the user may also select multiple items by left drag clicking down the list.

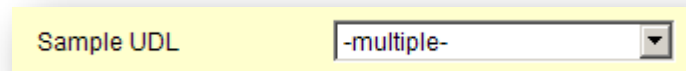


3. Clear the entry “Dog” by backspacing or deleting the value within the Sample UDL field.
Note that you should not deselect any of the items previously selected within the list. Now enter another value in the textbox to narrow down the list of items again. In this case, we will enter “Fish”.

Notice that the other values previously selected remain in the list despite the fact that they do not match the “Fish” criteria entered in the textbox. This is by design as it allows the user to view which items were previously selected.



4. Select the value “Fish-Grouper” and click away from the list. The UDL field will now denote that multiple items are selected. Clicking on the user defined list will again show the entries that were selected during the previous steps.



Range Field Format

The range field format applies to query strings composed of numbers or dates. To use a range field, enter two numbers that represent a range of numbers or dates within which you wish to search.

Note: Unless otherwise indicated by your System Administrator, the Date Range must be in the following format: mm/dd/yyyy.

The screenshot shows the iSYNERGY Search interface. At the top, there is a navigation bar with links for Logout, Datix, Help, and Info. Below this is a search bar with the text "Global Search" and a "GLOBAL" button. The main menu includes Search, Indexing, Upload, Routing, Admin, and Tools. The "Application" dropdown menu is set to "Invoices". Below this, there are three rows of input fields for "Invoice Number", "PO Number", and "Date". Each row has a "To:" field. A red box highlights the "Date" row, and a red arrow points to the "Range Index Fields" label. The "Date" row shows the range "06/01/2010" to "06/19/2010".

Field	From	To
Invoice Number		
PO Number		
Date	06/01/2010	06/19/2010

Note: You are required to specify a full range with a range query. However, to search on a specific number or date, fill in only the first field and leave the second field empty.

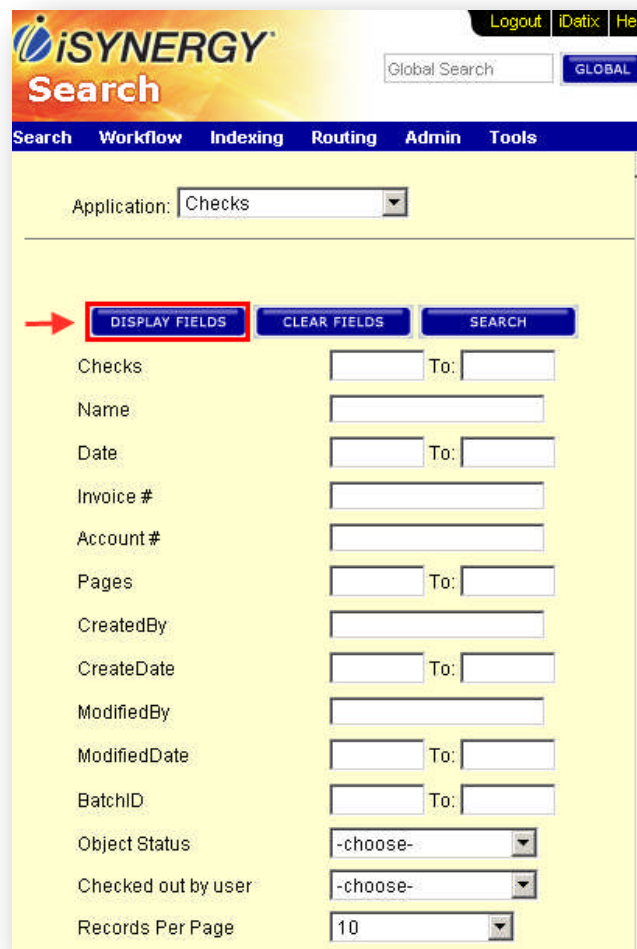
Display Fields

The Display Fields functionality allows a user to modify the displayed Index fields on the currently selected Application Search page, as well as the Results page.

Note: Display Fields settings are Application specific, as well as specific to the logged in user.

To modify which fields display on both the Search page and Results page for the current Application, follow these steps:

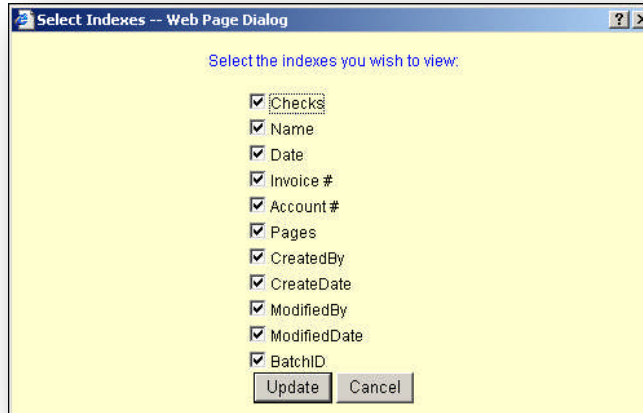
1. Select **Display Fields**.



The screenshot shows the iSYNERGY Search application interface. At the top, there is a navigation bar with links for Logout, iDatix, and Help. Below this is a search bar with the text 'Global Search' and a 'GLOBAL' button. The main menu includes Search, Workflow, Indexing, Routing, Admin, and Tools. The 'Application' dropdown is set to 'Checks'. The 'Display Fields' dialog is open, showing a list of fields with checkboxes and input boxes for 'To' values. The 'DISPLAY FIELDS' button is highlighted with a red box and an arrow. The fields listed are: Checks, Name, Date, Invoice #, Account #, Pages, CreatedBy, CreateDate, ModifiedBy, ModifiedDate, BatchID, Object Status, Checked out by user, and Records Per Page. The 'Object Status' and 'Checked out by user' fields have dropdown menus set to '-choose-'. The 'Records Per Page' field is set to 10.

Note: The Selected Indexes dialog displays.

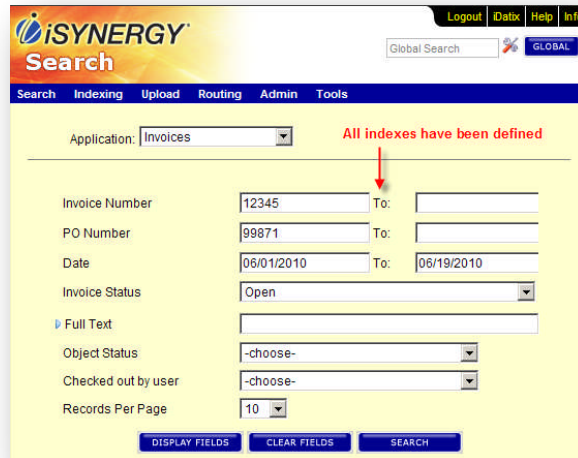
2. Only **Check** the **Index Fields** you want to display.



3. Select **Update**.
4. The current Application now displays only the Index fields selected.

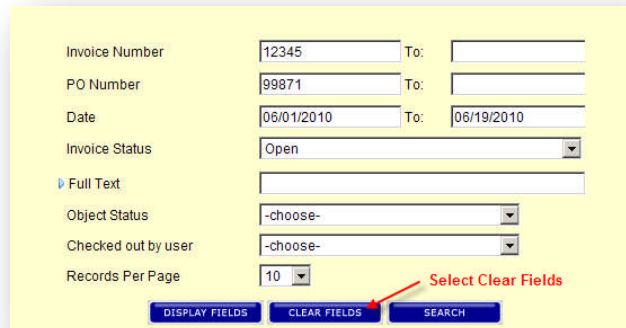
Clear Fields

This option provides a simple way to remove all search criteria previously entered by the user.



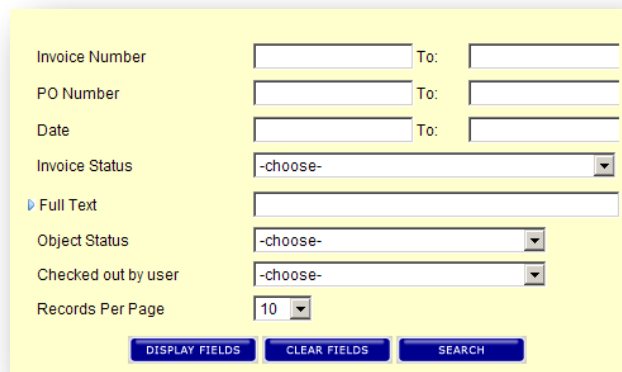
The screenshot shows the iSYNERGY Search application interface. At the top, there is a navigation bar with links for Logout, Datab, Help, and Info. Below this is a search bar with a 'Global Search' button. The main section is titled 'Application: Invoices' and contains a red message: 'All indexes have been defined'. Below this message, there are several search criteria fields: Invoice Number (12345), PO Number (99871), Date (06/01/2010 to 06/19/2010), Invoice Status (Open), Full Text (empty), Object Status (-choose-), Checked out by user (-choose-), and Records Per Page (10). At the bottom, there are three buttons: DISPLAY FIELDS, CLEAR FIELDS, and SEARCH. A red arrow points to the CLEAR FIELDS button.

1. Select **Clear Fields**.



This is a close-up view of the search criteria fields and the 'Clear Fields' button. The fields are: Invoice Number (12345), PO Number (99871), Date (06/01/2010 to 06/19/2010), Invoice Status (Open), Full Text (empty), Object Status (-choose-), Checked out by user (-choose-), and Records Per Page (10). The 'CLEAR FIELDS' button is highlighted with a red arrow and the text 'Select Clear Fields'.

2. The data contained in each respective index field is removed.



This screenshot shows the search criteria fields after the 'Clear Fields' button has been clicked. All fields are now empty: Invoice Number, PO Number, Date, Invoice Status, Full Text, Object Status, Checked out by user, and Records Per Page. The 'DISPLAY FIELDS', 'CLEAR FIELDS', and 'SEARCH' buttons are still visible at the bottom.

Index Types Administration

Selecting the Admin > Index Types from the iSynergy Menu Bar opens the Index Types administration features:



An Index type is composed of a set of attributes that allows storage of values as records in a database that complies with ODBC standards. Index Types are user defined and provide the ability to restrict the type of data that can be added for a particular type of field. Furthermore, formatting and masking can be set when defining the index types.

For example, you can use the Zip index Type or the Zip + 4 Index Type to standardize the way a user inputs the zip code for the business process.

Edit Delete	Zip	Text	5	####
Update Cancel	Zip + 4	Text	10	#####

By design, iSynergy contains pre-defined index types such as address line, company name, first name and social security number, as well as many others. These Index Types are designed to simplify your application definition process.

To view, edit and delete an iSynergy Index Types follow the steps below.

1. Navigate to the **iSynergy Menu Bar**.
2. Select **Admin>Index Types**.



Note: The Index Type dialog window displays.

3. Select **Add Type**.



Note: The Add Index Type dialog window displays.

4. Define the **Index Type Name**.

The screenshot shows the "Add Index Type" dialog window. It has a title bar that says "Add Index Type". Inside the dialog, there are several input fields: "Name", "Data Type" (a dropdown menu), "Length", "Mask", and "Format". A red arrow points to the "Name" field. At the bottom of the dialog, there are two buttons: "Create" and "Cancel".

5. Navigate to **Data Type** and select the **Drop Down Menu**.

The screenshot shows the "Add Index Type" dialog window with the "Data Type" dropdown menu open. The dropdown menu lists several options: "-choose-", "Boolean", "DateTime", "Decimal", "Numeric", and "Text". A red arrow points to the "-choose-" option in the dropdown menu. The "Name" field is also visible, and a red arrow points to it. At the bottom of the dialog, there are two buttons: "Create" and "Cancel".

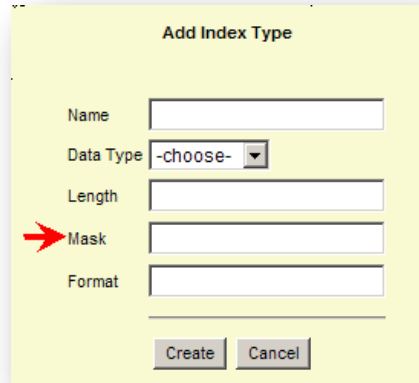
Element	Description
Boolean	Provides the ability to define an index data type where the values are either True or False.
DateTime	Provides the ability choose an index data type where the values are defined with a date and time.
Decimal	Provides the ability to choose an index data type where the values are defined by a floating numeric value point.
Numeric	Provides the ability to choose an index data type where the value is an numeric integer.
Text	Provides the ability to choose an index data type where the values can be either characters or numeric integer.

6. Tab to the **Length** text field and define the character length.

The screenshot shows a dialog box titled "Add Index Type". It contains several input fields: "Name", "Data Type" (a dropdown menu currently showing "-choose-"), "Length" (a text box with a red arrow pointing to it), "Mask", and "Format". At the bottom of the dialog are two buttons: "Create" and "Cancel".

Note: The Length text field denotes the maximum length of characters and spaces an Index Value can hold For example, if the Data Type is Text, the Length might be 25.

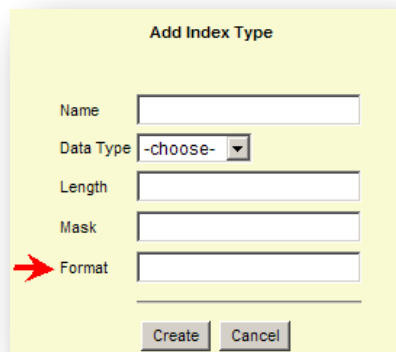
7. Tab to the **Mask** text field and define the mask.



The screenshot shows a dialog box titled "Add Index Type" with a yellow background. It contains five text input fields: "Name", "Data Type" (with a dropdown arrow), "Length", "Mask", and "Format". A red arrow points to the "Mask" field. At the bottom are "Create" and "Cancel" buttons.

Note: A Mask is a filter that selectively includes or excludes certain values. For example, when defining a database field, it is possible to assign a mask that indicates what sort of value the field should hold. Values that do not conform to the mask may not be entered.

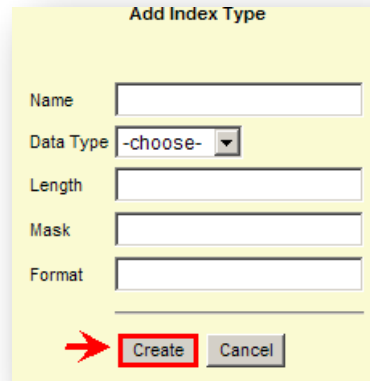
8. Tab to the **Format** text field and define the format.



The screenshot shows the same "Add Index Type" dialog box. In this view, a red arrow points to the "Format" field, which is the last of the five text input fields. The "Mask" field is now empty.

Note: The format text field provides additional control and functionality to index types. For example, if you use the DateTime Index type, you can specify United States style display (mm/dd/yyyy) or European style display (dd/mm/yyyy).

9. Select **Create**.



The 'Add Index Type' dialog box is shown with the following fields: Name (text input), Data Type (dropdown menu showing '-choose-'), Length (text input), Mask (text input), and Format (text input). At the bottom, there are 'Create' and 'Cancel' buttons. A red arrow points to the 'Create' button.

Note: An Index Type has been created and will be available for the use within an Application.

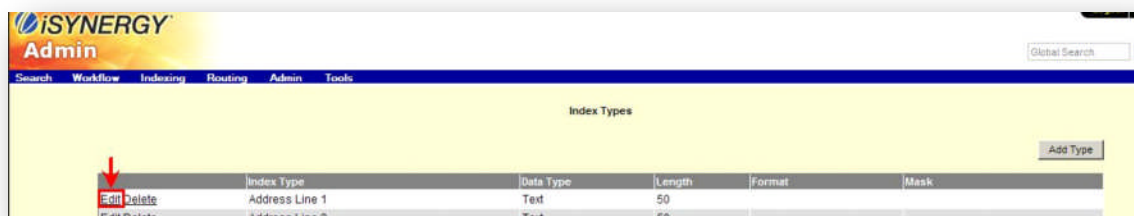
Editing and Deleting an Index Type

To edit an index type, follow the below steps:

1. On the iSynergy Menu bar, select **Admin>Index Types**.

Note: The Index Types dialog window displays.

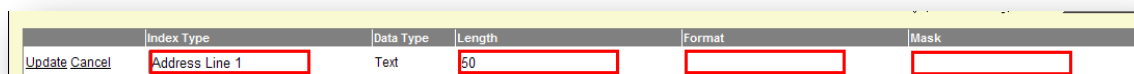
2. Navigate to the far left column and select **Edit**.



The 'Index Types' dialog window shows a table with the following columns: Index Type, Data Type, Length, Format, and Mask. The first two rows are 'Address Line 1' and 'Address Line 2', both with Data Type 'Text' and Length '50'. The 'Edit' button in the far left column is highlighted with a red arrow.

	Index Type	Data Type	Length	Format	Mask
Edit Delete	Address Line 1	Text	50		
Edit Delete	Address Line 2	Text	50		

3. Navigate to the Appropriate Index Value and make the appropriate changes.



The 'Index Types' dialog window shows the 'Address Line 1' row with the 'Edit' button highlighted. The 'Address Line 1' text is highlighted with a red box, and the '50' in the 'Length' column is also highlighted with a red box.

	Index Type	Data Type	Length	Format	Mask
Update Cancel	Address Line 1	Text	50		

4. Select **Update**.



The image shows a dialog window titled "Index Types". It contains a table with the following columns: Index Type, Data Type, and Length. The first row of the table has the values "Address Line 1", "Text", and "50". To the left of the table, there are two buttons: "Update" and "Cancel". The "Update" button is highlighted with a red box, and a red arrow points to it.

Index Type	Data Type	Length
Address Line 1	Text	50

Note: Selecting Cancel will not save your changes.

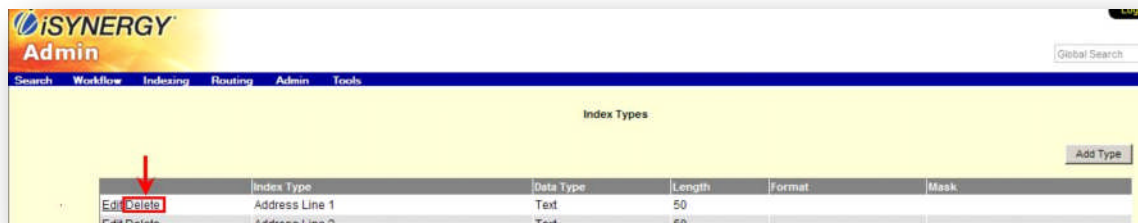
5. The Index Type has now been modified and updated in the Repository.

To delete an index type, follow the below steps:

1. On the iSynergy Menu bar, select **Admin>Index Types**.

Note: The Index Types dialog window displays.

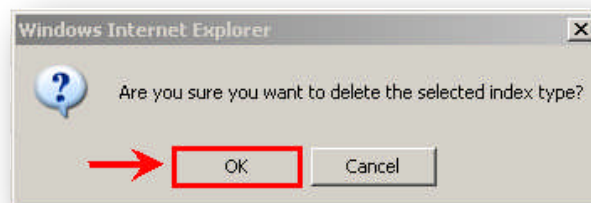
2. Navigate to the far left column and select **Delete**.



The image shows the iSynergy Admin interface. At the top, there is a menu bar with "Search", "Workflow", "Indexing", "Routing", "Admin", and "Tools". Below the menu bar, there is a section titled "Index Types". In the bottom left corner of this section, there are two buttons: "Edit" and "Delete". The "Delete" button is highlighted with a red box, and a red arrow points to it.

Note: A Windows Internet Explorer dialog window displays confirming you want to delete the selected index type.

3. Select **OK**.



Note: Select Cancel to close the Windows Internet Explorer dialog window and keep the index type.

4. The index type is removed from the Index Type dialog.

User Defined List (UDL) Administration

Selecting the Admin > User Defined Lists from the iSynergy Menu Bar opens the User Defined Lists administration features:



User Defined Lists (UDLs) are named lists of values that can be used to select a value to enter into an iSynergy Index Field. UDLs provide convenience, efficiency and ensure consistency during the data entry of Index Field values.

The following example illustrates the convenience, efficiency and consistency that results from using a drop-down menu of value choices that is provided by a UDL associated with an Index Field by the iSynergy administrator after the index field and UDL are defined.

A screenshot of a form field labeled 'Location'. The field is a drop-down menu with a list of values: 'Tampa', 'Boston', 'New York', 'Miami', 'Clearwater' (highlighted in blue), and 'NULL'. The field is set against a yellow background.

Convenience of UDLs

The user conveniently makes a selection such as the “Clearwater” location and the selection is immediately entered as a data value in the Location Index field on the form for the current Document being indexed, as shown below.

A screenshot of the same 'Location' form field. The drop-down menu is now closed, and the text 'Clearwater' is displayed inside the field. The field remains on a yellow background.

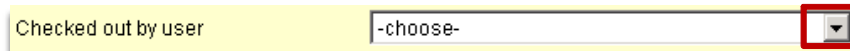
The entered value is not saved until all appropriate indexes are supplied and the operator uses a button to Submit or Update all of the entered indexes.

Efficiency of UDLs

Selection from a displayed list is usually quicker and easier than typing the correct value, especially when the values such as for Location contain many letters and the user does not need to remember what values are appropriate for each Index Field.

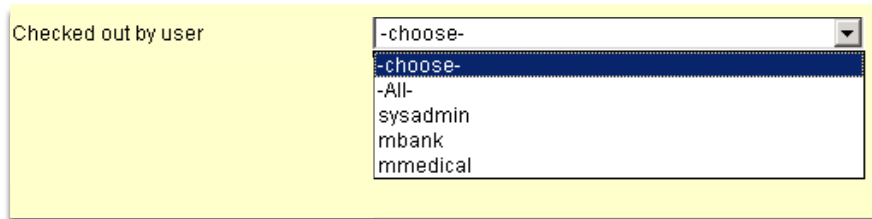
Ideally, short UDL lists of up to eight (8) values are ideal because the user does not have too many choices and the entire list can be seen in one drop-down display.

However, many Indexes such as “Checked out by user” can have many choices in a UDL that offers a list of all user-names which may be a large number of possible selections on a system with many users.



Checked out by user -choose- ▼

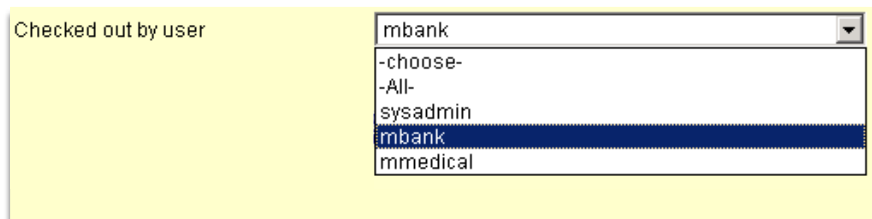
By clicking on the above, Drop-Down List control, shown above, a portion of a potentially long list of values is displayed.



Checked out by user -choose- ▼
-choose-
-All-
sysadmin
mbank
mmedical

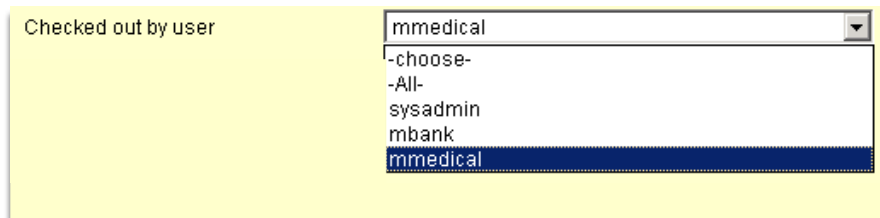
In order to efficiently address the need for longer UDL lists of values, a **Type-Ahead** feature allows the user to key a portion of the desired selection into the Index Field to automatically advance down a long list of values provided by the UDL to the section of the list that matches the keyed pattern, as shown below.

Assume that only a portion of this long UDL list of users and options is displayed at one time, we can quickly advance down the list to the “M” section by entering an “m” in the field to advance to a user name “mbank”, as shown below.



Checked out by user mbank ▼
-choose-
-All-
sysadmin
mbank
mmedical

By keying a second “m”, the selection is advanced to the next UDL entry that matches the keyed pattern of “mm” which is “mmedical”, as shown below.



Checked out by user mmedical ▼
-choose-
-All-
sysadmin
mbank
mmedical

After selection, the chosen value is the current value to be saved when the user does an action such as Submit or Update.



Checked out by user mmedical ▼

Each UDL list, as defined by the user, may only apply to a specific Index Field for an Application.

However, a UDL list may contain a common set of values that are also used for other Index Fields in the same application or across multiple applications. The ability to share common UDLs makes maintenance of choice lists simpler plus makes it easier for users to learn, remember and select correct Index field values.

Consistency of UDLs

Minimizing human errors such as misspellings, juxtaposition of characters while typing and incorrect keying of data is an extremely important factor that is addressed by the use of UDL value selections.

Just as important to the quality of your iSynergy data is the consistent use of well-defined UDL code values that can be associated with Index fields. UDL-driven entry prevents undefined and incorrect data from being entered into its associated Index field to provide consistent data values.

The consistent use of identical data values provided by UDLs improves Document search accuracy while providing accurate iSynergy database data. Since searches can be done within an application as well as across applications using advanced search techniques such as Global and Cross-Query search, having consistent data values maintained by shared UDLs makes them much simpler to specify and more effective to use.

UDLs are defined and available for viewing, by navigating to the iSynergy Menu Bar and selecting **Admin>User Defined List**.



Note: A UDL is automatically included in the default list of Index types and is assigned a data type of Select. All UDL columns contain a Null selection, which is a system-assigned Index value. If an Index field is not a required field and if left empty by the user, the Document will be assigned a Null Index value.

To better understand how a UDL might assist in Ad Hoc workflow processing, you may have a status-type UDL that contains consistent values that define specific steps in a business process.

For example, the HR Application might have a Pay Status index field that will be associated with a Payroll Process Status UDL (shown below) that defines the status values: "Pending", "In Process", "Complete" and "Cancelled".

As a Document is processed by Payroll, its Pay Status index is updated at the completion of each business process step to reflect where it currently is in the Payroll business process.

Note:

Within the HR Application definition, the following Index Fields are specified for the various types of documents in HR. Some of the Index Fields can have data typed in without the use of a UDL since using a UDL for Indexes such as Name (text field, 50 character max.), and Hire Date (Date/Time format, Date Index Type) values would be impractical – They are controlled by the edits and formats allowed for these generic data and index types.

However, the Pay Status Index Field has a DataType of “Select” indicating that values are chosen from the associated UDL “Payroll Process Status”.

Name	DataType	Index Type	
SSN	Text	SSN	
Name	Text	Name (50)	
Doc Type	Select	HR Doc Type	
Hire Date	DateTime	Date	
Status	Select	HR Status	
Location	Select	Location	
Pay Status	Select	Payroll Process Status	

Generic Data & Index Types
as its Index Type

Associated UDL Name
as its “Select” Index Type

Constraints on UDLs

Although UDLs provide the valuable benefits of Convenience, Efficiency and Consistency, they also have some constraints that must be observed to maintain the discipline needed to realize these benefits.

- UDLs contain static lists of values that can only be altered through the Admin > User Defined Lists editing features by a user with the required UDL administrative permissions.
- A UDL's list of values cannot be extended or altered by an end-user while indexing a document to protect the integrity of UDL definitions.
- Care must taken in the definition and maintenance of UDL definitions since the values selected from UDLs are stored as data in the iSynergy eSpeed database – Perhaps many times in many places on many different documents.

- Updates to UDLs should normally only be addition of new values to the UDL list.
- iSynergy database data could be corrupted should a UDL value list entry be changed or deleted since Documents containing that value in one or more index fields could be missed.

Since the Search form would no longer supply the altered UDL value to a search from its drop-down list, it cannot be used in a query plus iSynergy monitors Index values matching their code values against their associated UDL definitions – A mismatch will generate a system error.

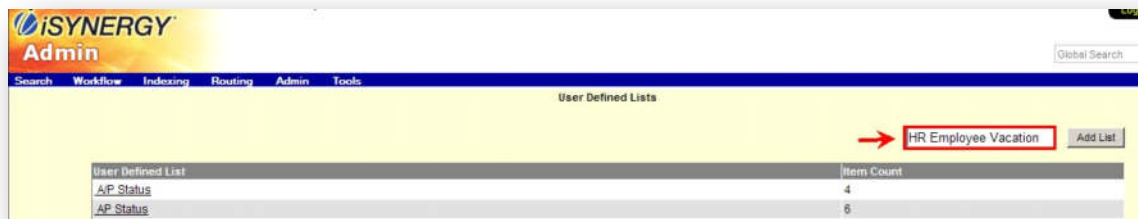
- When a UDL list value must be changed or removed, it is essential that the administrator:
 1. Add the altered list value's new replacement code to the UDL list or be sure that an entry to substitute for it already exists in the UDL (e.g., by default the value "NULL" is always present in every UDL).
 2. Locate all Documents in the eSpeed database that contain the value which is about to be altered – Then apply the change to the replacement code value in the UDL (i.e., the new code, an existing code or the default "NULL") to all affected records, before altering the original UDL code value. It is recommended that this step be done when no one is currently using the system when possible.
 3. Now that the UDL list entry that needs to be changed or removed no longer exists in the iSynergy eSpeed database documents, it is safe to remove the UDL code value to be altered since its replacement value is already in the UDL list (from step #1).
- Removal of an entire UDL also requires similar care once the iSynergy UDL definitions have been implemented.
- If the system is in use while a user with administrative permissions alters a UDL by adding a new value or otherwise altering it, when the UDL change is updated the UDL definition is changed.

*However, it is possible that some active users still have the prior UDL list of values in cache memory and may not see the recent changes immediately. They can use the **Admin>Reset iSynergy** feature to ensure that the latest changes to the UDL are downloaded after the reset. For this reason, it is best to deploy UDL changes during times of little or no production activity.*

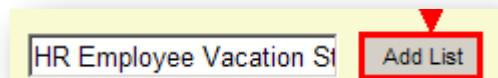
Create a UDL

To create a UDL, follow the below steps:

1. On the iSynergy Menu bar, navigate to **Admin>User Defined Lists**.
2. Navigate to the **Add List** text field.
3. **Name** the UDL.



4. Select **Add List**.



*Note: Do not use special characters in UDL value selections when creating an application. These include: ! \$ % ^ & * () + : ; ' < > . , ? / { } [] | \ ~ ` " .*

Certain special characters could unexpectedly cause an unwanted mass update in the database table due to a known MS SQL Flaw called SQL injection. If you would like additional information, please contact iDatix Client Support services and/or review the following web site. <http://support.microsoft.com/kb/954476>

5. The name of the UDL displays in the User Defined List dialog.

User Defined Lists	
	<input type="text"/> <input type="button" value="Add List"/>
User Defined List	Item Count
AP Status	4
AP Status	6
Christmas Decision	2
Christmas Doc Type	4
Christmas Status	5
Corr Code	0
Correspondance	0
Demo Doc Type	8
Doc Type	3
EOB	0
File Types	11
Fund Program	0
Glenms List	3
Golf Doc Type	4
HCFA	0
Healthcare Doc Type	6
Healthcare Status	8
HR Doc Type	15
→ HR Employee Vacation Status	3
HR Status	3

Add a List item to a UDL

To add one or more list item to a UDL, follow these steps:

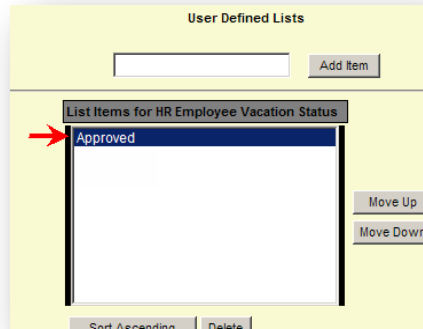
1. On the iSynergy Menu bar, select **Admin>User Defined Lists**.
2. Navigate to the UDL you want to **modify**.

Note: The User Defined List dialog displays.

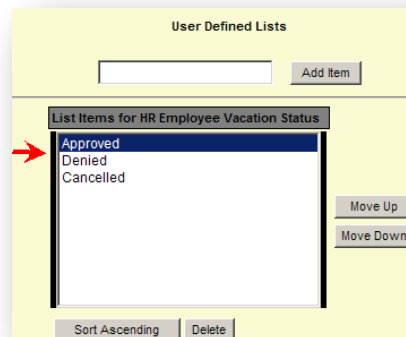
3. Navigate to the **Add Item** text field and enter the name of the Index value to be displayed.

4. Click **Add Item**.

Note: The defined List Value is placed in the UDL pane.

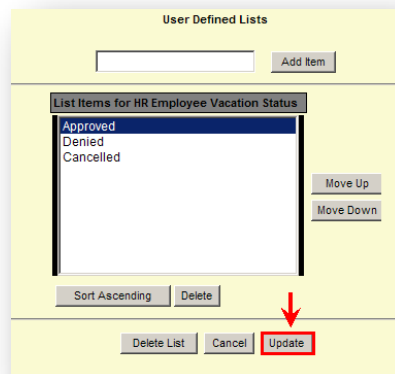


5. Repeat steps 3 and 4 until all list items have been added to the UDL.



Note: To rearrange the list items, select either Move Up, Move Down or Sort Ascending.

6. Select **Update**.



Note: To cancel the UDL list, select Cancel. Additionally, to delete the entire UDL list, select Delete List.

Delete an Item in a UDL

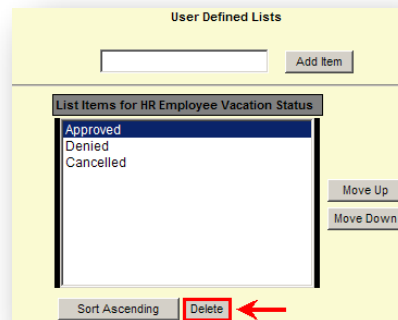
iDatix best practice does not recommend deleting a UDL item in an implemented Application because you could potentially disrupt a workflow and cause database orphans.

This will result in a system generated error; however, if you choose to delete an item on a UDL, follow the steps below:

1. On the iSynergy Menu bar, navigate to **Admin>User Defined Lists**.
2. Navigate to the **UDL** you want to delete.

Note: The User Defined Lists Modification dialog displays.

3. Select the item in the list you want to delete.
4. Click **Delete**.



5. You have now deleted an item in the UDL.

Delete an Entire User Defined List

As mentioned previously, once you have created, implemented and began using an application, it is important to remember that you should normally not delete a UDL list item or an entire UDL.

If an index value contained in the UDL is presently in any record for the application, deleting an index in the list and/or the complete UDL may cause database orphans.

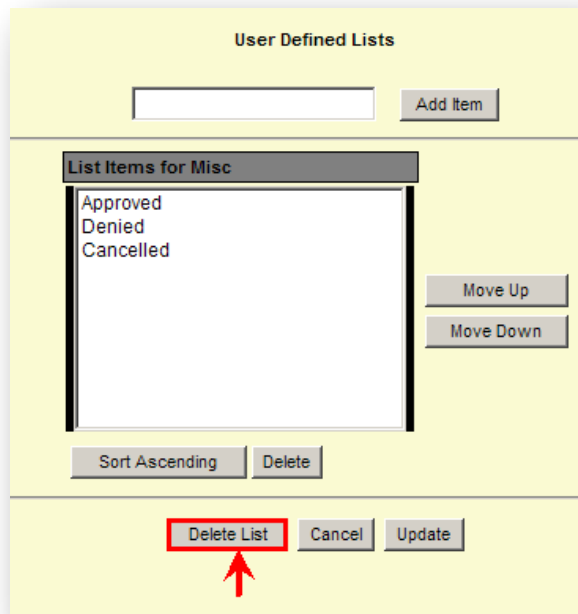
In other words when a user accesses a document, iSynergy matches its index value against the associated UDL list -- should the UDL no longer contain the list item, iSynergy will no longer recognize the former index value which produces a system error.

For example, if a document has an index value from a UDL of 'Maid in America' and later the UDL is corrected to show 'Made in America', the document can no longer find the original entry and will generate an error.

The way to avoid this is to have someone update all database tables that reference the changed or deleted item. The table needs the same entry as the document to prevent the error. If there is no DBA on hand to make the changes, it is advisable to refrain from altering existing UDL items. You can add to the list, but not delete or edit. For additional help, please contact the iDatix Client Support Services department.

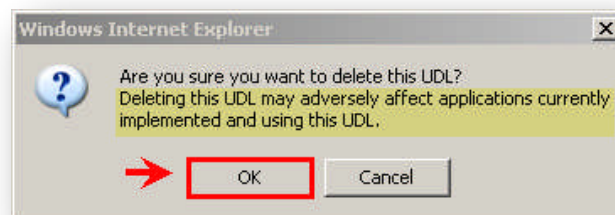
To remove an entire UDL, follow these steps:

1. On the iSynergy Menu bar, select **Admin>User Defined Lists**.
2. Navigate to the **UDL** you want to delete.
3. Select **Delete List**.



Note: A Windows Internet Explorer dialog window displays. Ensure that you read the error message as some applications maybe utilizing the UDL you are deleting.

4. Select **OK**.



Creating an Application

Once you have thoughtfully planned the structure and function of your Application, it is easy to create and implement your Application in iSynergy. Proper analysis and planning combine to ensure effective implementation of Application(s) that meet or exceed intended goals for their use.

The basic Application definition requires a minimal set of defined parameters to accomplish the definition process. The fundamental parameters are the index values that will be used to access, search, secure and manage the stored documents. This data stored in index fields is also called metadata since it is data that *describes* documents and their content.

iSynergy allows for a practically unlimited number of index values per iSynergy Application (Virtual Filing Cabinet). Each index can be completely customized to meet the need of the documents and processes being automated. Again, the basic core index values are:

- ID Number
- Name
- Date
- Document Type
- Document Status

You will find that there is a common theme when defining indexes for iSynergy. You just have to ask yourself what am I looking for and how do I want to be able to find it.

If you think about most filing solutions, they are organized by a number in numerical order or by a name in alphabetical order. In an actual paper-base environment when you wanted to store a document by both methods, you would have to copy the document and store it in two different physical files.

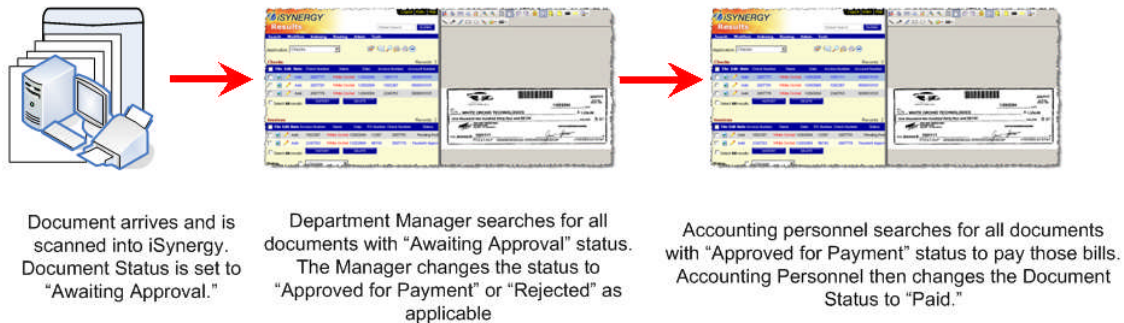
iSynergy allows you to file a document in multiple ways without the need for copies or the labor to manage two different filing systems. You simply create multiple index values in the Application definition and a single stored copy of each document can be retrieved by searching any of the Indexes as well as any combination of Indexes.

iSynergy can be configured to use a simple process *Status* value to represent where work is at each step in a business process. The Status values are defined using a User Defined List (UDL) of possible work steps (or process tracking values) such as: Pending, Waiting for Approval, Approved, Denied and Completed.

Note: For more information, please review the UDL section of this manual.

As work is captured by the iSynergy solution, the business process *Status* Index is set to "Awaiting Approval" to initiate the workflow process. Each worker may execute a search in iSynergy to find work that needs to be completed for a given Status and then save the query; thus allowing the same saved-query to be easily reused to simplify the search process and automate the method for each user to obtain their work.

The following example, shows the progress of work from initial capture having its process Status Index field updated as the work moves from one work step to another while it is handled by different users at each task in the business process.



Often it is necessary to assign work to a specific user or team. This can be done by creating an *Assign To* index to help drive the ad-hoc process. Used with the Status index values, you can control the flow of documents and content through the defined business process for a specific user or team doing a specific work-process task.

Thus, the user of iSynergy can send work to the accounting manager for approval. After approval, the accounting manager can send the work to the payment department for payment or back to the submitter for additional information.

Ad-Hoc workflow is a user-driven process and is dependent on the user's ability to correctly assign the index values for the process Status Index Field at the end of their task in order for the work move to the next task in the process.

With Ad-Hoc workflow, there is no process enforcement and no business rules that automatically test for the conditions that determine what actions should be taken.

For example, a business rule might define: "If the amount is greater than \$1000 then send it to a manager for approval; otherwise the current operator is allowed to continue processing it". Ad-Hoc workflow is driven by user knowledge and action and does not process or enforce business rules. The user must know the rule and adhere to it. Basic Ad-Hoc workflow is included with the base iSynergy product suite.

At the next higher level of workflow functionality, **iDatix Progression** is a comprehensive workflow tool that can enforce business rules and processes plus give the user the ability to use a graphical tool to design a business process application without the need for programming.

For example, with Progression a business rule can be defined and automatically enforce the rule: "If the amount is greater than \$1000 then send it to a manager for approval; otherwise the current operator is allowed to continue processing it". This simplifies the user's job and ensures uniform compliance with defined business rules.

The iSynergy solution is the foundation for implementing the **Progression** workflow automation product.

*Note: For further example and documentation on workflow status and workflow automation, please review the iDatix **Progression Advanced User Manual**.*

Below is a quick reference for creating an application.

Note: For the complete application checklist, please review Appendix 1.

When creating an Application, it is highly recommended that you follow these steps.

1. Create new **Index** types (if required).

Note: iDatix best practice for custom index values are no more than five; however, this will vary slightly up or down based on the needs of the end user and the particular process.

2. Create **UDLs**.
3. Create the **Application**.
4. **Add Indexes** to Application.
5. Select **Implement**.

You use the Menu Bar to select Admin > Application to open the functions that define and maintain iSynergy Applications, as shown below.



Create a new Application

To create a new Application in iSynergy, follow the steps below:

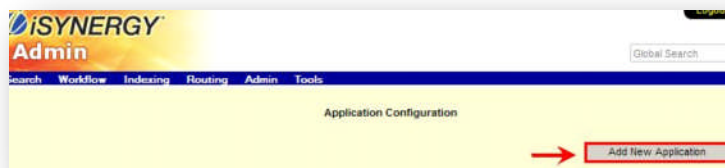
Note: The following instructions assume that Index Type(s) and UDL(s) have been successfully created. If not, see the instructions on creating Index Types and UDLs discussed previously in this Manual.

1. On the iSynergy Menu bar, navigate to **Admin>Applications**.



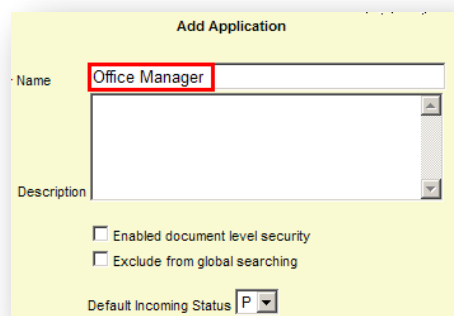
Note: The Application dialog window displays.

2. Select **Add New Application**.



Note: The Add Application dialog window displays.

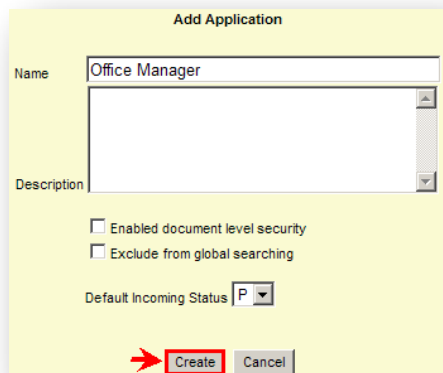
3. Enter the **Application** name.

The image shows the 'Add Application' dialog window. It has a yellow background and a title bar that says 'Add Application'. There are two main input fields: 'Name' and 'Description'. The 'Name' field is highlighted with a red box and contains the text 'Office Manager'. Below the 'Description' field, there are two checkboxes: 'Enabled document level security' and 'Exclude from global searching'. At the bottom, there is a 'Default Incoming Status' dropdown menu with the letter 'P' selected.

If applicable, tab to the Description Pane and enter a description for the named Application. Additionally, if you want the Application to have Document level security and/or be excluded from Global searching, select the appropriate checkbox.

Note: By default, all newly created Applications are assigned the P status. For more information regarding iSynergy status, please review Appendix 2 – iSynergy Statuses.

4. Select **Create**.



The 'Add Application' dialog box has a yellow background. It contains a 'Name' field with 'Office Manager' entered, and a larger 'Description' text area below it. There are two unchecked checkboxes: 'Enabled document level security' and 'Exclude from global searching'. Below these is a 'Default Incoming Status' dropdown menu set to 'P'. At the bottom, there are three buttons: a red arrow pointing to a 'Create' button (which is highlighted with a red box), a 'Cancel' button, and an unlabeled button.

Note: If an Application is implemented, the Implemented column on the Application Configuration is listed as True. If the Application is de-implemented, the column value is listed as False.

5. You have now created an Application and you can begin adding indexes.

Deleting an Application

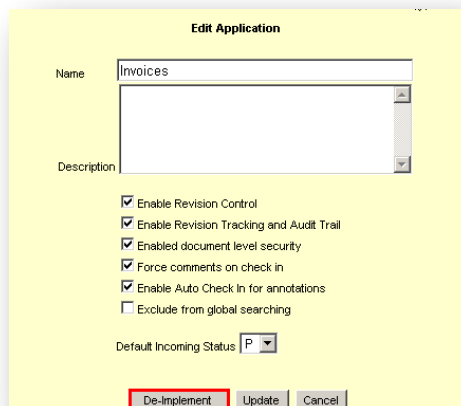
To delete an application, follow the below procedure:

Note: When you delete an entire Application, the associated work items and documents are also deleted.

1. Navigate to **Admin>Application**.
2. Select the **Application** you want to delete.

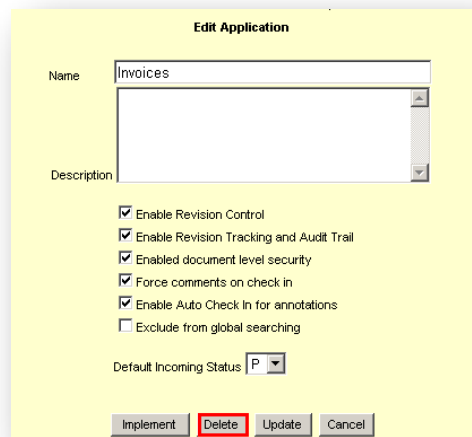
Note: The Edit Application dialog displays.

3. Select **De-implement**.



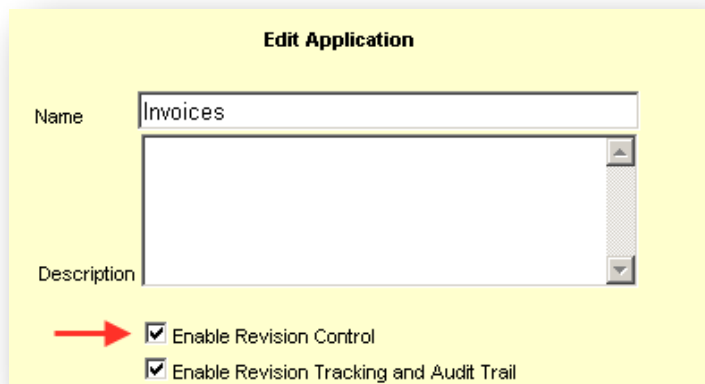
The 'Edit Application' dialog box has a yellow background. It contains a 'Name' field with 'Invoices' entered, and a larger 'Description' text area below it. There are six checkboxes: 'Enable Revision Control', 'Enable Revision Tracking and Audit Trail', 'Enabled document level security', 'Force comments on check in', 'Enable Auto Check In for annotations', and 'Exclude from global searching'. The first five are checked, and the last one is unchecked. Below these is a 'Default Incoming Status' dropdown menu set to 'P'. At the bottom, there are three buttons: a 'De-implement' button (highlighted with a red box), an 'Update' button, and a 'Cancel' button.

4. Select **Delete**.



Enabling Revision Control

Revision Control provides the capability to retain a history of older versions of documents. The revision control feature can be configured for specific application cabinets and with several degrees of retention.



Revision control provides the ability to manage multiple revisions of a document. iSynergy offers this robust functionality so that you may simplify your workplace through a one stop shopping and management for all your documents. Enabling Revision Control provides the ability to manage multiple versions of a document contained within an Application.

Note: Revision Control functionality has additional features that can be used to tightly control the document management process. Please see the sections below for additional information.

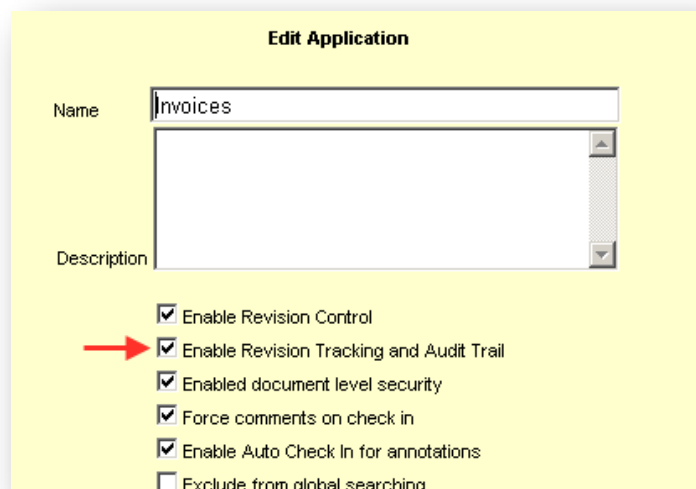
1. On the iSynergy Menu bar, select **Admin>Applications**.

Note: If you have created the application, simply select and modify it. If you have not created the application, select Add Application.

2. Select **Enable Revision Control**
3. Continue creating or modify the Application.
4. Select **Update**.
5. When you are finished, select **Implement**.

Enabling Revision Tracking and Audit Trail

The Revision Tracking and Audit Trail option provides the ability to track the document versions.



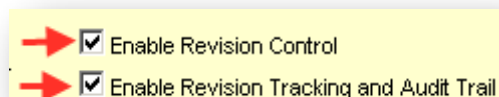
Edit Application

Name: Invoices

Description:

- ☒ Enable Revision Control
- ☒ Enable Revision Tracking and Audit Trail
- ☒ Enabled document level security
- ☒ Force comments on check in
- ☒ Enable Auto Check In for annotations
- ☐ Exclude from global searching

Note: This is an application setting and will only be available if Revision Control is enabled.



- ☒ Enable Revision Control
- ☒ Enable Revision Tracking and Audit Trail

Utilizing both Enable Revision Control and Enable Revision Tracking and Audit Trail application settings, provides the ability to track all document changes as separate revisions. This functionality allows a user to roll back to previous versions of a document, view the original

document and recover the original document by promoting it back to the current or most recent version of the document.

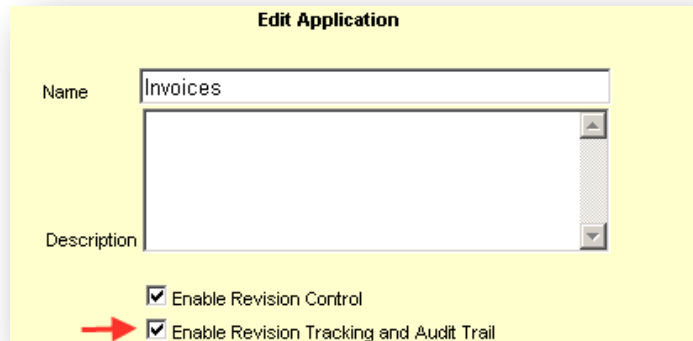
Note: In addition to these application settings, the user must also have defined Account Functionality Management permissions. Please review the permission section of this manual for additional information.

To enable Revision Tracking and Audit Trail, follow the steps below:

1. On the iSynergy Menu bar, select **Admin>Applications**.

Note: If you have created the application, simply select and modify it. If you have not created the application, select Add Application.

2. Ensure that Enable Revision Control is selected.
3. Select **Enable Revision Tracking and Audit Trail**.

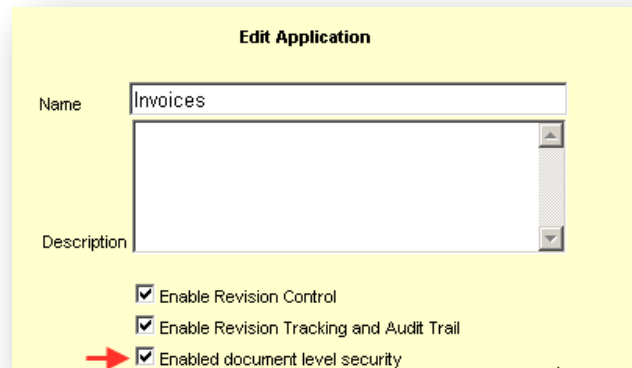


The screenshot shows a dialog box titled "Edit Application". It has two main input fields: "Name" and "Description". The "Name" field contains the text "Invoices". The "Description" field is empty. Below these fields, there are two checkboxes. The first checkbox is labeled "Enable Revision Control" and is checked. The second checkbox is labeled "Enable Revision Tracking and Audit Trail" and is also checked. A red arrow points to the second checkbox.

4. Continue creating or modifying the application.
5. When you are finished, select **Update**.
6. Select **Implement**.

Enabling Document Level Security

Document level security enables a System Administrator to grant access to an iSynergy Application while limiting the access rights to particular Documents contained within that Application.



Edit Application

Name: Invoices

Description:

☒ Enable Revision Control

☒ Enable Revision Tracking and Audit Trail

☒ Enabled document level security

For example, you want to give a manager the ability to securely view any document in the HR application, but you want the payroll department to only have access to the documents with a "Pending New Hires" application status value and will not be able to access documents with other application status values in the Accounting Application under iSynergy.

When you are adding indexes to applications with document level security, the security setting for the new indexes for each User and Group must be selected.

Note: The Application does not need to be De-implemented to enable Document level security.

To activate Document level security within an Application, follow these steps:

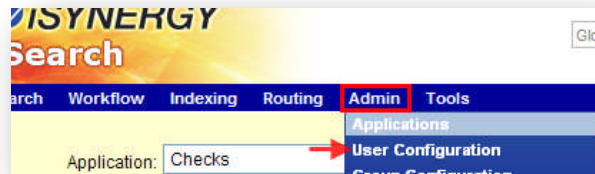
1. On the iSynergy Menu bar, select **Admin>Applications**.
2. Navigate to and select the **Application** you want to edit.
3. Select **Enabled Document Level Security** checkbox.
4. Select **Update**.

User Account Document Level Security

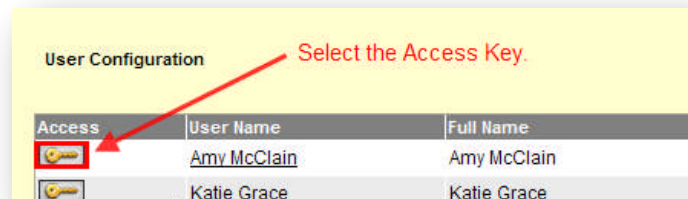
The following steps configure Document Level Security for a specific user account.

Note: The Document Level Security procedure is the same for Groups as well, with the exception of Step 1. You will navigate to Admin>Group Configuration.

1. On the iSynergy Menu bar, select **Admin>User Configuration**.



2. Select the desired Users **Access Key**.



3. Navigate to **Application Permissions**.
4. Select the Application with **Document Level Security**.

Login Expiration: Never Expires ☐ Reset Password Next Login

System Level Permissions

<input type="checkbox"/> Application Add	<input type="checkbox"/> Application Delete	<input type="checkbox"/> User Add
<input type="checkbox"/> User Update	<input type="checkbox"/> User Delete	<input type="checkbox"/> Index Type Add
<input type="checkbox"/> Index Type Update	<input type="checkbox"/> Index Type Delete	<input type="checkbox"/> User List Add
<input type="checkbox"/> User List Update	<input type="checkbox"/> User List Delete	<input type="checkbox"/> System Options Update
<input type="checkbox"/> User Group Add	<input type="checkbox"/> User Group Update	<input type="checkbox"/> User Group Delete
<input type="checkbox"/> Pre Sort Application	<input type="checkbox"/> Pre Sort Person	<input type="checkbox"/> InBox
<input type="checkbox"/> System Reporting	<input type="checkbox"/> Remove Session	<input type="checkbox"/> ScanDox
<input type="checkbox"/> Search Any User Checkout	<input type="checkbox"/> Search All Applications Checkout	<input type="checkbox"/> Work Item List
<input type="checkbox"/> Progression Studio	<input type="checkbox"/> Reassign Tasks	<input type="checkbox"/> Reassign Any Task
<input type="checkbox"/> Priority Edit		

User group assignments:
Accounting Group [View](#)

Application Permissions

Application Name	Document Level Permissions	Configuration
<input checked="" type="checkbox"/> Checks	ALL	
<input type="checkbox"/> GeneralCapture	ALL	
<input type="checkbox"/> Invoices		

Select the Document Level Security icon.

5. Select the **UDL values** you wish to make available to the User or the Group.

User Name: Amy McClain Full Name: Amy McClain

Invoices Permissions

Status <input type="checkbox"/> Pending Post <input type="checkbox"/> Payment Approved <input type="checkbox"/> Rejected <input type="checkbox"/> Paid <input type="checkbox"/> Payment Pending <input type="checkbox"/> New Invoices <input type="checkbox"/> NULL	state Alabama Alaska Arizona Arkansas California Colorado Connecticut Delaware Florida Georgia
---	---

☐ Select All ☐ Select All

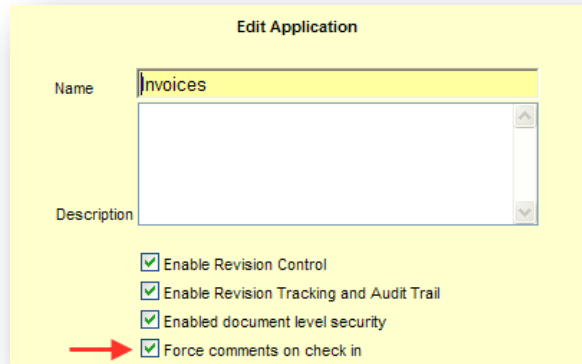
Update Back

Note: To select multiple Indexes hold the Ctrl key and select the appropriate indexes with your mouse. Additionally, if a specific user should have permission to access and modify the Index, click Select All.

6. Select **Update**.

Force Comments on Check In

An application may be configured to provide a simple check in/out capability, which will force users to check out a document for editing and prevents more than one user from making changes to a document at the same time.

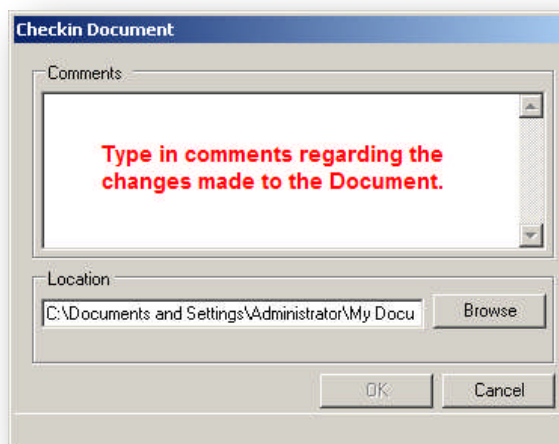


Using this application setting, the documents that are checked back in to the application will overwrite the original version of the document.

Regardless of how the user chooses to check out the document, either by downloading or editing in place, when the user is ready to check the document back into the iSynergy Repository, a Check-In Document dialog displays and provides the ability to enter text.

When the user has finished typing a comment, select OK and the comments are available to any user who has access to that specific application.

Force comments on check in works with Enable Revision Control and Enable Revision Tracking and Audit Trail. When an application uses this functionality, a comments dialog displays upon checking in a document into the iSynergy Repository.



To activate Force Comments on Check In, follow these steps.

1. On the iSynergy Menu bar, select **Admin>Applications**.

2. Navigate to and select the Application you want to **edit**.
3. Select **Force Comments on check in** checkbox.

The screenshot shows the 'Edit Application' dialog box. The 'Name' field contains 'HR_Employee Vacations' and the 'Description' field contains 'iDatix HR_Employee Vacations'. Below these fields are several checkboxes: 'Enable Revision Control' (checked), 'Enable Revision Tracking and Audit Trail' (unchecked), 'Enabled document level security' (unchecked), 'Force comments on check in' (checked, with a red arrow pointing to it), 'Enable Auto Check In for annotations' (checked), and 'Exclude from global searching' (unchecked).

4. Select **Update**.

Enable Auto Check in for Annotations

Enable Auto Check in for Annotations is an Application security setting that eliminates the need to check in a document when a user only changes annotations on a document and there are no physical changes to the image.

The screenshot shows the 'Edit Application' dialog box. The 'Name' field contains 'Checks' and the 'Description' field contains 'iDatix Checks Application'. Below these fields are several checkboxes: 'Enable Revision Control' (checked), 'Enable Revision Tracking and Audit Trail' (unchecked), 'Enabled document level security' (unchecked), 'Force comments on check in' (unchecked), 'Enable Auto Check In for annotations' (checked, with a red arrow pointing to it), and 'Exclude from global searching' (unchecked). At the bottom, there is a 'Default Incoming Status' dropdown menu set to 'P'.

Note: This is an application setting and will only be available if Revision Control is enabled.

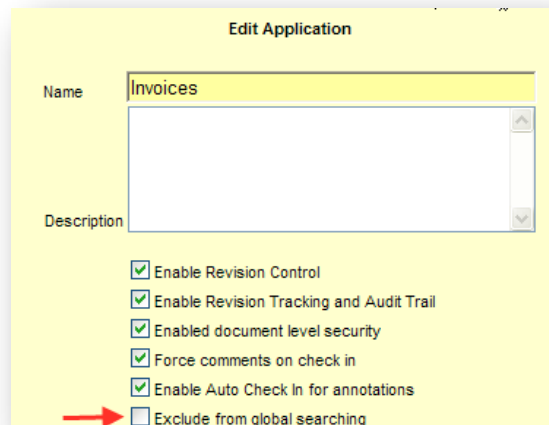
When Enable Auto Check in for annotations is selected, the document is automatically checked in upon the user leaving the image in the Viewer; the user is not prompted to check in the document, nor is the user forced to make comments on a check in.

Note: This feature only applies to the case where a user adds, deletes or modifies annotations and no other changes to the document are made. If a user checks out a document and also performs any other changes to the document, such as a page rotation or page deletion, the auto check in for annotations will not apply.

Exclude from Global Searching

Global Searching provides the ability to search across all applications based on any index, annotation, note, event, or full text data value. When an application is created, administrators can tightly control the ability to globally search for these values.

Global Searching also provides the ability to search for any document, regardless of the status and display it on the Search page. Global searches are performed across all enabled Applications for which the User has access permissions. Values matching the search criteria are returned regardless of the index type and the index name associated with the index value following a global search.



The screenshot shows the 'Edit Application' dialog box. The 'Name' field is filled with 'Invoices'. The 'Description' field is empty. Below the fields, there are five checkboxes, all of which are checked: 'Enable Revision Control', 'Enable Revision Tracking and Audit Trail', 'Enabled document level security', 'Force comments on check in', and 'Enable Auto Check In for annotations'. The 'Exclude from global searching' checkbox is unchecked and is pointed to by a red arrow.

Add Indexes to an Application

Once an Application has been created, you are ready to add indexes.

For additional reference material regarding Application Setup, please review Appendix 1.

1. On the iSynergy Menu bar, navigate to **Admin>Applications**.

Note: The Application Configuration dialog window displays.

2. Locate the created **Application**.
3. Select **Add Index**.

Edit Application

Name:

Description:

☒ Enable Revision Control
☒ Enable Revision Tracking and Audit Trail
☐ Enabled document level security
☒ Force comments on check in
☒ Enable Auto Check In for annotations
☐ Exclude from global searching

Default Incoming Status:

Select Add Index.

4. Enter the **Index Name**.

Index Group By Index Order Index Visibility **Add Index**

	Name	DataType	Index Type	Required	Sticky	Multi-Edit	
Edit	Checks	Numeric	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Name	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Date	DateTime	Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Invoice #	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
	<input type="text" value="Account #"/>		Address Line 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Add Cancel

5. Select the **Index Type** drop-down menu and choose the appropriate index type.

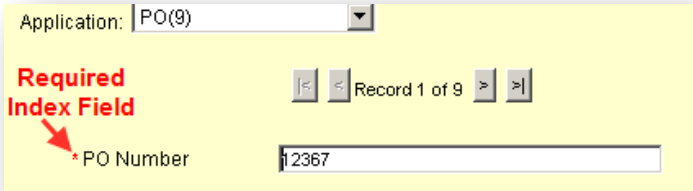
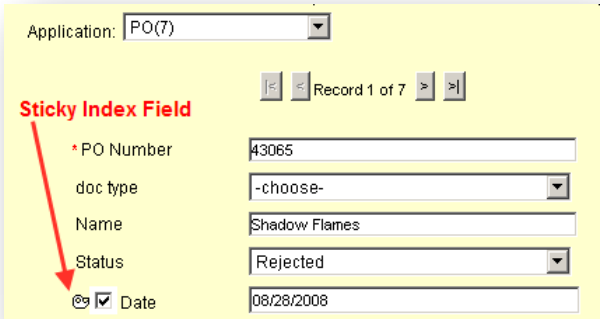

Index Group By Index Order Index Visibility **Add Index**

	Name	DataType	Index Type	Required	Sticky	Multi-Edit	
Edit	Checks	Numeric	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Name	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Date	DateTime	Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Invoice #	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
	<input type="text" value="Account #"/>		Text (25)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Add Cancel

6. If appropriate, select **Required**, **Sticky** and/or **Multi-Edit**.

Index Group By Index Order Index Visibility **Add Index**

	Name	DataType	Index Type	Required	Sticky	Multi-Edit	
Edit	Checks	Numeric	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Name	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Date	DateTime	Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Invoice #	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
	<input type="text" value="Account #"/>		Text (25)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Add Cancel

Element	Description
Required	<p>Provides the ability to require a user to enter a value for an index before the document is submitted to iSynergy.</p> 
Sticky	<p>Provides the ability to keep a data value displayed in the index field after the document is submitted to iSynergy.</p>  <p><i>Note: If a UDL is made sticky, the value last placed in the UDL will remain for the next document to be indexed.</i></p>
Multi-Edit	<p>Provides the ability for an index to be modified for multiple documents simultaneously.</p> 

7. Select **Add**.

	Name	DataType	Index Type	Required	Sticky	Multi-Edit	
Edit	Checks	Numeric	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Name	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Date	DateTime	Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Invoice #	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
	Account #		Text (25)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Add Cancel

Note: The newly created Index appears in the Application table pane. Within this table, you can edit or delete Index values associated with the Application.

Editing Application Indexes

To edit an Application index, follow these steps:

1. On the iSynergy Menu bar, navigate to **Admin>Applications**.

Note: The Application Configuration dialog window displays.

2. Select the appropriate **Application**.

3. Select **De-Implement**.

Edit Application

Name: Checks

Description:

☒ Enable Revision Control
☒ Enable Revision Tracking and Audit Trail
☐ Enabled document level security
☒ Force comments on check in
☒ Enable Auto Check in for annotations
☐ Exclude from global searching

Default Incoming Status: P

De-Implement Update Cancel

4. Navigate to the Index Field you want to edit and select **Edit**.

	Name	DataType	Index Type	Required	Sticky	Multi-Edit	
Edit	Checks	Numeric	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Name	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Date	DateTime	Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Invoice #	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Account #	Text	Text (25)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete

5. Make the appropriate changes.

Index Group By Index Order Index Visibility Add Index

	Name	DataType	Index Type	Required	Sticky	Multi-Edit	
Edit	Checks	Numeric	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Name	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Date	DateTime	Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Invoice #	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Update Cancel	Account #	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Editing

Make the appropriate changes.

6. Select **Update**.

Index Group By Index Order Index Visibility Add Index

	Name	DataType	Index Type	Required	Sticky	Multi-Edit	
Edit	Checks	Numeric	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Name	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Date	DateTime	Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Invoice #	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Update Cancel	Account #	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Editing

7. Select **Update**.

Edit Application

Name: Checks

Description:

☒ Enable Revision Control
☒ Enable Revision Tracking and Audit Trail
☐ Enabled document level security
☒ Force comments on check in
☒ Enable Auto Check in for annotations
☐ Exclude from global searching

Default Incoming Status: P

Implement Delete **Update** Cancel

Index Group By Index Order Index Visibility Add Index

	Name	DataType	Index Type	Required	Sticky	Multi-Edit	
Edit	Checks	Numeric	Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Name	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Date	DateTime	Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Invoice #	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Edit	Account #	Text	Text (50)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete

8. Select **Implement**.